

# 457(b) Plan Enrollment Instructions



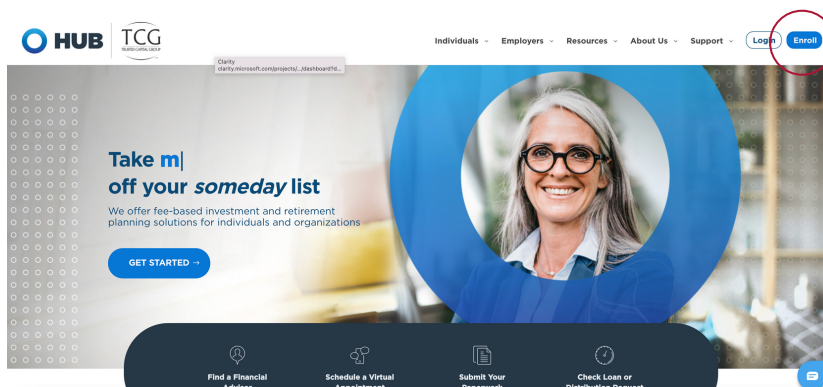
These instructions are for creating and accessing a traditional 457(b) account and/or a Roth 457(b) account.

**TRADITIONAL 457(b):** This plan automatically deducts part of your salary into the retirement savings plan before taxes are taken out. The money grows tax-deferred until it's withdrawn—then the taxes come due.

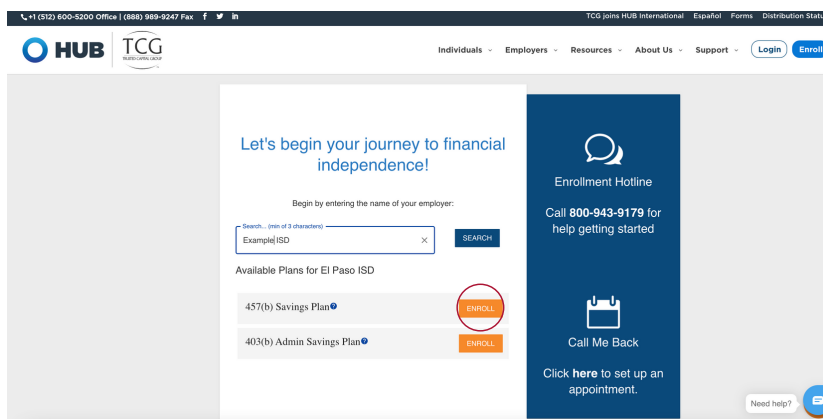
**ROTH 457(b):** This plan automatically deducts part of your salary into the retirement savings plan after taxes are taken out. The interest and earnings withdrawn from a Roth account are tax-free if the distribution is considered “qualified.”

**REMINDER:** You can have both a traditional and a Roth 457(b)—and contribute to one or both at the same time—if allowed by your plan.

1. Go to [www.tcgservices.com](http://www.tcgservices.com) and click **Enroll**.



2. Type the name of your **Employer** in the search box and click **Enroll** on the **457(b) Savings Plan**.



3. Enter your **Social Security number** to continue.

If the website indicates that “a user name and password already exists,” then proceed with the following steps:

Enter your Social Security Number as the **username**, and your birthday in numerical digits (MMDDYYYY) as the **password**.

**For example:**

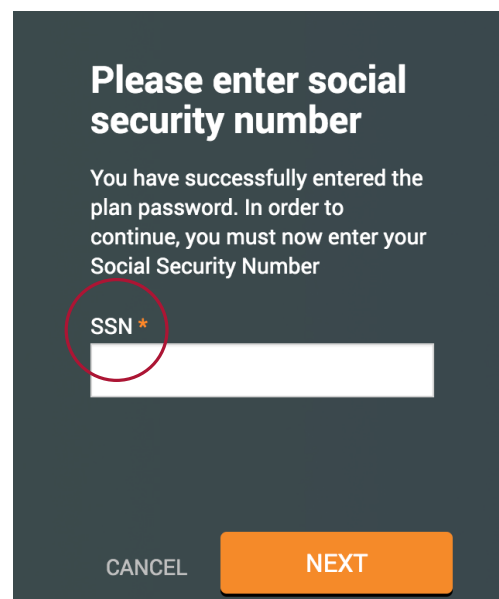
Social Security number: 123456789

Birthday: 01/02/1980

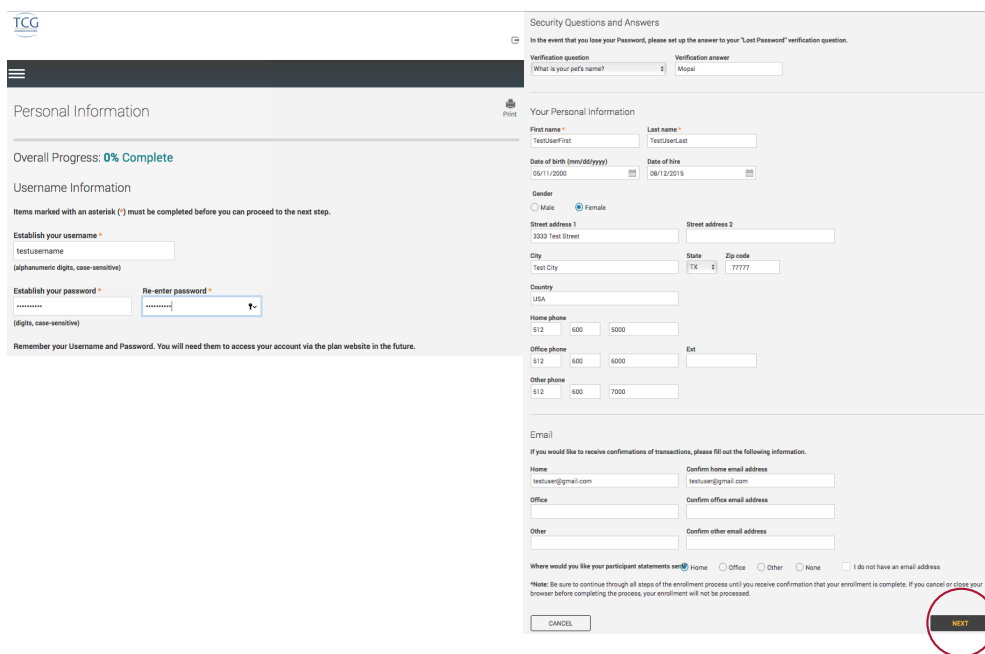
**Username:** 123456789

**Password:** 01021980

If you are still unable to login, please call **(800) 943-9179**

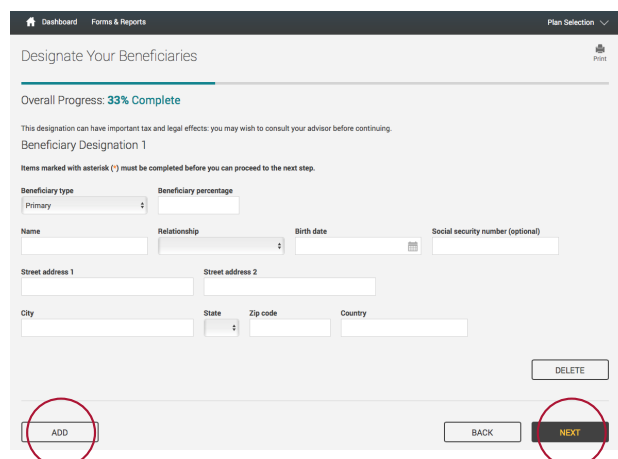


4. Create your Username and Password; enter all personal information; then click **NEXT**.



5. Designate your beneficiaries on this screen. After you insert your Primary beneficiary's information, click **ADD** to add additional beneficiaries.

Click **NEXT** when you are done.



## 6. Contributions

Make your selection from the drop down box—either the **Pre-Tax** or post-tax **Roth** contribution type.

Enter the contribution dollar amount per pay period. (If allowed by your district, you may select your funds by percentages.)

Click **NEXT**.

Please note that the contribution amount is the amount you want deducted from your paycheck **EVERY** pay period.

Dashboard Forms & Reports Plan Selection

### Contributions

Overall Progress: **40% Complete**

Current Contribution Amounts

| Last Web/VRL Contribution | Total                 |
|---------------------------|-----------------------|
| Pre-Tax Deferral          | \$0.00 per pay period |
| Roth                      | \$0.00 per pay period |

Change Contribution Amounts  
Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

> Rules and Criteria

| Action    | Contribution Type | Percent/Dollar | Current Contribution | New Contribution Rate |
|-----------|-------------------|----------------|----------------------|-----------------------|
| No change | Pre-Tax Deferral  | Dollar         | Not contributing     | 0.00 per pay period   |
| No change | Roth              | Dollar         | Not contributing     | 0.00 per pay period   |

RESET BACK **NEXT**

7. Click **All Sources** to reveal the funds available.

Dashboard Forms & Reports Plan Selection

### Select Investments

Overall Progress: **50% Complete**

The investment elections you enter below will be applied to all sources of contributions (including any employer contributions). Please note that once you have completed the enrollment process, you can always change your investment elections. For more information, please contact your plan administrator once you have completed the enrollment process.

I elect to invest all future contributions (including employee and employer contributions) as follows.

> Rules and Criteria

> **All Sources**

BACK **NEXT**

8. Here you will apply the dollar amount (or percentage) of your contribution to the investment(s) of your choice.

Once you are satisfied with your choices and your total at the bottom of the page equals 100%, click **NEXT**.

I elect to invest all future contributions (including employee and employer contributions) as follows.

> Rules and Criteria

> All Sources

| Investment                           | Current Elections | New Elections |
|--------------------------------------|-------------------|---------------|
| RAMS Aggressive Growth               | 0.00%             | 0.00%         |
| RAMS Capital Preservation            | 0.00%             | 0.00%         |
| RAMS Conservative                    | 0.00%             | 0.00%         |
| RAMS Growth                          | 0.00%             | 0.00%         |
| RAMS Moderately Conservative         | 0.00%             | 0.00%         |
| RAMS Signature Portfolio             | 0.00%             | 0.00%         |
| DFA Continental Small                | 0.00%             | 0.00%         |
| DFA Intl Small Cap Value             | 0.00%             | 0.00%         |
| DFA Large Cap International          | 0.00%             | 0.00%         |
| DFA US Large Company Portfolio       | 0.00%             | 0.00%         |
| Vanguard Total Stock Index           | 0.00%             | 0.00%         |
| DFA US Large Value                   | 0.00%             | 0.00%         |
| Vanguard Wellington                  | 0.00%             | 0.00%         |
| Blackrock Total Return Intl          | 0.00%             | 0.00%         |
| Columbia Corporate Income Fund Y     | 0.00%             | 0.00%         |
| Met Life Stable Value Fund           | 0.00%             | 0.00%         |
| Victory Emerging Markets Small Cap I | 0.00%             | 0.00%         |
| Victory Fund For Income              | 0.00%             | 0.00%         |
| Goldman Sachs Commodity Strategy     | 0.00%             | 0.00%         |
| DFA US Micro Cap                     | 0.00%             | 0.00%         |
| DFA US Small Company                 | 0.00%             | 0.00%         |
| DFA US Small Value                   | 0.00%             | 0.00%         |
| TOTAL                                | 0.00%             | 0.00%         |

RESET TABLE

BACK **NEXT**

9. Review all entries. Make any changes using the Edit buttons

Click **SUBMIT** when you are satisfied.

The screenshot shows the 'Enrollment steps' form. At the top, it says 'Overall Progress: 66% Complete'. Below this is a 'Confirm & Submit' section with a note: 'If your enrollment information is correct, click below to submit your enrollment request.' There is a 'Please Note' section with a red warning: 'This submission will not create an account with the Investment Providers. By completing this election, you agree to the terms of the electronic salary reduction agreement, that can be viewed by clicking here.' The form contains several fields for personal information: Username (testusername), First name (TestUserFirst), Last name (TestUserLast), Street address 1 (3333 Test Street), Street address 2, City (Test City), State (TX), Zip code (77777), Country (USA), Date of birth (05/11/2000), Date of hire (08/12/2015), Home phone ((512) 600-5000), Office phone ((512) 600-6000 Ext), Other phone ((512) 600-7000), Home email address (testuser@gmail.com), Office email address, and Send email confirmation to (Home). There is a 'Security Question' section with 'Security Question 1' (What is your pet's name?) and 'Answer 1' (Mopsi). Below this is the 'Investment Elections' section, which includes 'Employee Deferral' and a list of future contributions: AXA Equitable Life Insurance (\$25.00), Jefferson National Life Insurance Company (\$25.00), Life Insurance Company of the Southwest (\$10.00), PlanMember Svcs Corp. (\$35.00), Rydex Investments (\$25.00), and Transamerica Life Insurance Co. (\$60.00). At the bottom, there is a 'SUBMIT' button. Red circles highlight the 'Edit' button and the 'SUBMIT' button.

10. Well done! You are finished! Your six-digit Confirmation Number will be emailed to you.

The screenshot shows the 'Enrollment steps' form after completion. It says 'Overall Progress: 100% Complete'. A green banner with a checkmark icon says: 'Congratulations! Your Account has been Created. The confirmation number for this transaction is: 348162'. Below this, it says: 'You may access your account via the plan's website at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.' There is a 'Reminders' section that says: 'Your contribution may be cancelled if your Vendors and Products are not properly registered. To review your Product Registration, click here.'

11. From this **Dashboards** screen you can view the performance of your funds, change your contribution rate, manage your investments, etc.

Scroll down to see your chosen investments, fund ID, performance, paycheck deductions and balance.

(The two funds shown are examples only.)

The screenshot shows the 'My Dashboard' screen. It has a navigation bar with links: Dashboard, Manage, Plan, Performance, Loans & Withdrawals, Forms & Reports, and Plan Selection. The main content area is divided into three sections: 'Account Balance' showing a balance of \$0.00, 'Contribution Rate' showing Pre-tax and Roth contributions, and 'My Portfolio'. The 'My Portfolio' section has a 'View' dropdown set to 'Overview' and a 'Performance model' dropdown set to '1 year'. Below this is a table with the following data:

| Investment Name                | Fund ID | Performance | From My Paycheck | Balance |
|--------------------------------|---------|-------------|------------------|---------|
| DFA US Large Company Portfolio | DFUSX   | -0.15%      | 25%              | \$0.00  |
| Vanguard Total Stock Index     | VTSMX   | -8.64%      | 75%              | \$0.00  |



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**Disclosures:**

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